

fundings guidelines

Funding Exchange Funding Guidelines Effective 2003

This booklet provides instructions for the Funding Exchange National Office annual grantmaking cycle, with TWO annual deadlines. It contains guidelines and application forms for applicants to the OSD funds (Out Fund, Saguario Fund and Grantmaking Docket) and to the Paul Robeson Fund.

Grant Application Deadlines:

March 1: OSD Program - Page 2

Ot Fund for Gay & Lesbian Liberation
Saguario Fund
Grantmaking Docket

May 15: Paul Robeson Fund for Independent Media - Page 6

You *cannot* apply to both the OSD Funds and the Robeson Fund in the same year.

All applications must either be **HAND-DELIVERED** by 6:00 p.m. EST or **POSTMARKED** by the appropriate deadline.

Funding Exchange

666 Broadway, Suite 500
New York, NY 10012

212-529-5300/Fax: 212-982-9272

www.fex.org

Funding Exchange Network

The Funding Exchange (FEX) is a network of 16 community funds across the country and a national office in New York City, all of which administer their own independent grantmaking programs. The network was formally established in 1979 to support member and emerging funds with technical assistance and special programs. Altogether, the national office and the member funds have distributed over \$100 million, and have developed models of grantmaking that are used by many other public foundations.

The Funding Exchange Network is a partnership of activists and donors. The founding donors and community organizers coined the phrase "change, not charity," because they believed in the importance of tackling the root and systemic causes of poverty and injustice. Most of the founding donors had inherited wealth which provided the seed money to launch nearly all the community foundations in the network.

A list of the 16 member funds is included at the end of this guidelines booklet. Please contact them directly for their applications, funding priorities and deadline information. We strongly encourage you to apply to a member fund if there is one in your area. At the national office we also look to the member funds for information about the organizations that apply to us from their regions.

Grantmaking Programs of the National Office

The Activist-Advised Programs:

The hallmark of the Funding Exchange is a commitment to grantmaking that involves the participation of community activists who work within and understand their communities, and bring an invaluable depth of analysis to the decision-making.

The Funding Exchange National Office has three activist-advised grantmaking funds which make grants through its Annual Grantmaking Cycle: The Saguaro Fund, the OUT Fund for Lesbian and Gay Liberation and the Paul Robeson Fund for Independent Media. For each fund, six activist panel members, serving staggered terms, work together with FEX staff to review annual grant proposals and make decisions about which groups to fund and how to use monies strategically. Activist panelists help set criteria for evaluating proposals and recommend grant awards. The panelists are chosen each year through a national call for activists. **For more information on becoming an activist-advised panel member please see our website for important dates and application information.**

The Donor-Advised Program:

The Donor-Advised Program invites progressive individuals and families across the country to establish "donor-advised funds" within the Funding Exchange National Office. Through these funds, donors are able to support a broad spectrum of community-based organizations challenging social and economic injustice. Grants made through the Donor-Advised program are at the discretion of donors and funding exchange staff and do not require a separate application process. Unlike the activist-advised program, which makes grants once a year through the annual grantmaking cycle, grantmaking from the donor-advised program is a more open-ended process, depending upon donor interest and the availability of funds to make grants.

The Grantmaking Docket connects the national donor-advised program with the annual grantmaking cycle of the Funding Exchange by allowing groups that apply to the annual cycle to be considered for funding by donors in the donor-advised program. Groups that apply to the annual cycle (exclusive of Paul Robeson applicants) as described in the OSD portion of this booklet, may be designated for inclusion in the annual grantmaking docket for the coming year. Funding Exchange staff will then recommend them for funding to the donors in our donor-advised program. This process gives donors an opportunity to learn about the particular work of individual organizations as well as about broader issues and movements in the U.S. and across the globe. Donors work with staff to determine grant amounts. Please see the Grantmaking Docket section for details.

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OSD Grantmaking Programs

OSD stands for Funding Exchange's three community organizing programs: OUT Fund for Gay & Lesbian Liberation, Saguaro Fund and Grantmaking Docket.

Guidelines and Priorities

The Funding Exchange funds social change community organizing. We define social change as creating, transforming and sustaining processes which enable and encourage members from every part of a community to become active in identifying and addressing injustice, be it within social systems, institutions or the broader community. We prioritize programs and projects that originate in communities that are most directly impacted by injustice. We look for innovative and radical work that seeks to educate and challenge existing power structures, and that promotes the leadership of the constituencies being adversely affected.

The OSD Funds prioritize community-based organizing around a variety of issues, including but not limited to: economic equity; environmental justice; social justice; anti-oppression; media and cultural activism; movement building; and international solidarity with progressive movements abroad.

Candidates for funding should meet the following criteria:

- **Working for Social Change** to eliminate oppression.
- **Organizing as a Primary Strategy:** All other work of the organization, including advocacy and service provision, must be connected to the primary organizing strategy. For example, if an organization serves victims of domestic violence they must demonstrate that the service and advocacy they provide are connected to a broader effort to change the institutional policies, laws or practices that uphold domestic violence. We also fund organizations which provide resources for organizing.
- **Constituency Involvement and Leadership:** The community impacted by the program or project must have key leadership in all decision-making processes as well as in defining and carrying out the work.
- **Limited access to corporate or mainstream sources of funding.**

The Funding Exchange can make grants to organizations or programs that:

- are tax-exempt under the Internal Revenue Code Section 501(c)(3);
- have established a relationship with a fiscal sponsor with IRS tax-exempt status;
- conform to the IRS definition of charitable or educational activities;
- under very specific circumstances, fall under the Internal Revenue Code Section 501(c)(4) as lobbying organizations;
- submit international documents verifying their charitable or non-profit status. Please see the **International Grantmaking** section for more information.

In general, the Funding Exchange does not fund the following:

- capital campaigns, equipment purchases, endowments or deficit financing;
- organizations with access to traditional or mainstream funding sources;
- community organizations with relatively large *annual/overall* budgets (generally over \$500,000);
- individual projects, such as graduate research or fellowships;
- publications or cultural projects which are not directly connected to organizing campaigns or used as tools for social change organizing;
- the provision of social services if they do not demonstrate a degree of organizing to challenge the systems that lead to oppression;
- other grantmaking foundations.

For more information on the structure of the Funding Exchange grantmaking programs, please see the inside front cover of this booklet.

The OUT Fund for Gay and Lesbian Liberation

The OUT Fund was established to support radical organizing projects working to build community among lesbians, gay men, bisexuals, transsexuals, and transgender and intersex people. In addition to the OSD general funding priorities, the OUT Fund gives priority to organizing that:

- demonstrates a capacity for addressing the politics of race, class, gender and sexuality as integral to systems of oppression;
- develops long-lasting coalitions;
- is developed within and led by marginalized communities, such as people of color, poor people, youth, elders, or disabled people, or is based in rural or other isolated areas;
- addresses gender, sexuality and the liberation of transgender and transsexual people as an explicit component of their work;
- assists in organizing across national boundaries to build an international lesbian/gay/bisexual/ transsexual/ transgender/intersex movement.

The Saguaro Fund

In addition to the OSD general funding priorities, the Saguaro Fund supports organizations that:

The Saguaro is a cactus which grows in the Sonoran desert of the southwestern United States. Its roots provide water and its branches provide food and shelter for those needing nourishment in inhospitable environs.

- primarily serve communities of color;
- are led by community members;
- engage in grassroots organizing;
- emphasize leadership development;
- actively involve constituencies being served by their work in board, staff and other leadership positions;
- prioritize networking and alliance building;
- work in coalitions and organizations doing multi-issue work that make connections across divisions;
- promote the leadership of Native Americans, youth, elders, lesbians, gay men, bisexuals, transsexuals, transgender and intersex people;
- work in rural communities;
- promote workers' rights.

The Grantmaking Docket

Funding Exchange staff may place organizations into consideration for funding by the OUT Fund or the Saguaro Fund based on whether the issues and constituencies the applicants serve fall under the criteria for these two funds. The third possibility for OSD applicants that meet FEX guidelines and priorities is the Grantmaking Docket. The Docket is a catalogue-type publication that includes short descriptions of selected organizations. The Docket is compiled by FEX staff and distributed to donors who are involved in our national donor-advised program. Staff then engages donors in dialogue about the organizations and their work in a larger political context. This process results in donors advising grants, through the Funding Exchange, to the organizations.

International Grantmaking

In general, the OSD grantmaking programs fund progressive social change organizing work in the U.S., its territories, jurisdictions and former colonies. Each year, the Funding Exchange may include a small number of international grants in designated countries or geographic regions, particularly those where there are viable struggles against the oppressive effects of U.S. corporate and government policies and/or policies of international lending institutions. Grant proposals from countries outside these designated areas will not be considered for funding. Organizations from outside the U.S. need to meet all Funding Exchange guidelines and criteria. Applicants are encouraged to contact FEX to find out whether or not proposals are being accepted from a specific country in any given year. **Please call or email FEX Grants staff between January 1 and March 1 only.**

How to Apply - OSD Grantmaking Programs

1. Review FEX guidelines and the enclosed NNG Common Grant Application Form
2. Complete Sections I-IV of the NNG Common Grant Application Form, referring to the information below for clarification.

Important Notes:

Effective as of the 2003 grantmaking cycle, **we have eliminated the Letter of Inquiry (LOI) and form (Grant Inquiry Cover Sheet)** from our application process.

Once OSD applications have been received, Funding Exchange staff will screen them for designation to one of the three OSD programs: The OUT Fund for Lesbian and Gay Liberation, the Saguaro Fund, or the Grantmaking Docket. **Applicants may not apply specifically to the OUT Fund, the Saguaro Fund or the Docket, but only to the OSD program as a whole.** Funding Exchange staff will make all designations to specific Funds or programs.

A copy of the NNG Common Grants Application Form is enclosed with each set of FEX Guidelines. You can also receive the Form as a download from the Funding Exchange website at www.fex.org, or by calling with your request that one be faxed or mailed to you.

The Funding Exchange requires that all applicants provide the information as requested in the NNG Form. We ask that you do not alter the cover sheet or other sections of the form, and that you do not leave out any of the information we are requesting, particularly the demographic or budgetary information. **When you are finished, you should have the following fully-completed components of your application to the Funding Exchange:**

- **Cover sheet**
Please include two sets of contact information, if possible.
- **Narrative of no more than five pages**
This is a key part of the proposal. FEX pays particular attention to your organizing strategy and goals, rather than a description of the problem you are trying to solve. Please also note if you have a funding history with one of the FEX Member Funds listed in the back of this booklet.
- **All checked (✓) Attachments/Requirements**
An evaluation plan
Organizational Structure and Administration (Section B. of NNG form), Items 1-4
—In addition to board demographics, FEX also asks for a full demographic profile of your organization's staff.
Finances (Section C. of NNG form), items 2-7
This includes:
—a full, line-item organizational budget for the preceding fiscal year
—a full, line-item organizational budget for the current year
—project budgets for the preceding and current years, if you are requesting project support
—a letter from the IRS certifying your organization's or fiscal sponsor's non-profit, tax exempt status
- **Budget**
You may use the NNG budget format or your own budget format that provides the checked (✓) information requested in Part III, Section C. **Your budget should provide income sources and amounts as well as expenses.**

If you are planning to apply to the Robeson Fund, which is not a part of OSD grantmaking, you may NOT apply to OSD in the same year. Remember that the Robeson application process and form are different and carry different requirements than OSD. Please see the section on the Paul Robeson Fund for application forms and specific instructions on page 6.

Grant Inquiries

If you have questions about the process or whether your organization's work falls within the criteria in our grant-making guidelines please **call the Funding Exchange Grants Department any time between January 1 and the third week in February**. You may call up to March 1, but remember, the postmark deadline is March 1, and we cannot accept late applications or portions of applications after the deadline, or emailed and faxed applications.

Please Note: Applications are only accepted between February 1 and the March 1st postmark deadline.

Those who may be visiting the New York City area and who would like to arrange a visit with FEX Grants Staff, please inquire by sending an email containing the possible dates and times to grants@fex.org. Or, call the Grants Assistant to make your request. Grants staff will do our best to accommodate your request.

The Staff Review and Decision-making Process

All application materials are carefully read, discussed and evaluated by Funding Exchange Staff. In some cases, you may be interviewed over the phone, or asked for additional information which clarifies your organization's work. Once your proposal has been reviewed and depending on a variety of factors including eligibility according to FEX criteria and available resources, the staff may match your work with the OUT Fund, the Saguaro Fund or the Grantmaking Docket. Such matching is strategically done based on a variety of factors that might include: whether or not the application shows that the organization and work clearly meet additional Activist-Advised Fund criteria; whether we have a category in our docket that will nicely showcase the organization and work; where we think an organization will get the best support. If the organization is routed to the OUT Fund or the Saguaro Fund, the contact person listed on the organization's cover sheet will be interviewed by an activist-panelist, most likely via telephone, some time between the end of May and the beginning of September. Because this period includes prime summer vacation time, we ask that if at all possible, you give us at least two sets of contact information so that if and when it is time to set up an interview we are able to do so. The interviews, for those who need them, must be finished before our Activist-Advised Fund Panel members meet to make grant decisions each year. If an interview is not conducted with an organization, a decision will be made based upon the paper application.

The Grant Award Process

Funding decisions for the OUT and Saguaro Funds are made during activist panel meetings in the fall. Your organization will be notified by mail in October as to whether or not it has been selected to receive a grant. If selected, your organization, and your fiscal sponsor, if applicable, will receive a grant award package. The package will contain a grant agreement form that must be signed and returned in a timely manner to the Funding Exchange. Activist-advised (OUT and Saguaro) grants generally range from \$5,000-\$20,000. A grant check will be released after the original copy of the signed grant agreement form is received in our office. This process takes approximately four to six weeks.

If your program is selected for a Docket grant through our Donor-Advised program, it is impossible to be precise about the timing and the amount your organization might eventually receive! The Docket is mailed to donors in the late fall, usually around Thanksgiving. Donors may take a minimum of two months after they have received the docket to make their grant decisions. FEX staff and donors make every effort to award all docket grants by the end of March of the *following* year, but some awards may not be made until the late spring of that following year. **Because of the high volume of applications and the complexities of our various OSD funding mechanisms, we are not able to answer questions about the status of an application via telephone or email.** We will notify you when we receive your application if you send us a self-addressed, stamped postcard along with your application.

Reporting Requirements

Applicants who have received prior funding from FEX must complete a Fiscal and Progress report as follow-up to the most recent grant received. See our website to download this form.

Thank you for your work, and for your interest in the Funding Exchange!

Paul Robeson Fund for Independent Media

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Introduction

Named to honor singer, actor and civil rights activist Paul Robeson, the Fund supports media activism and grassroots organizing by funding the pre-production and distribution of social issue film and video projects, and the production and distribution of radio projects, made by local, state, national or international organizations and individual media producers. The Fund solicits projects of all genres that address critical social and political issues, combine intellectual

clarity with creative use of the medium and demonstrate understanding of how the production will be used for progressive social change organizing.

The maximum grant award is \$20,000, most grants range between \$5,000 to \$15,000. **The Fund has one grant cycle a year, and the postmark deadline is May 15.**

What We Fund

The Robeson Fund makes grants to radio projects in all production stages and to film and video projects in the pre-production or distribution stages only. We do not support production or post-production costs for film and video projects. Applicants may submit only one (1) project for consideration and may not be listed as producer or director on any other project submitted to the Fund during a single funding cycle. If you have submitted an application to the OSD programs you may not submit an application to the Paul Robeson Fund in the same year.

Radio Criteria

The Fund is looking for audio projects that combine compelling content with creative use of the medium. The programming can be topical or historical, but should be designed to facilitate grassroots activism, expose issues that have received minimal coverage from mainstream media, or provide a progressive analysis or vision of current events. Specifically, the Fund seeks to help organizations, activists and audio producers create:

- 1) a pilot or demo for a series
- 2) a "special" or package of special programming
- 3) a series of short features or modules or
- 4) an on-going series (including live "talk shows"). Station or network-based producers may apply as independents as long as they are the originators of the programming concept and retain editorial and artistic control.

Programming supported by the Fund may be aired on a commercial or a public radio station, or be distributed through a regional, national, or satellite radio network. The audio product must be broadcast on air at least once. Broadcasting on the Internet can only be considered as an additional source of distribution, not a substitution for on-air broadcast. Acquisition or sale of the programming to a radio station, network or media organization is acceptable. The Paul Robeson Fund priorities in projects that will increase and extend the use of social change media beyond the traditional distribution channels including non-broadcast and education use or other forms of community distribution.

Film and Video Criteria

The Paul Robeson Fund priorities continue to be strategic in their funding of film and video:

- (1) **Pre-production:** support for film and video projects dealing with progressive perspectives on critical social issue themes. Non-traditional approaches to media production are encouraged. Pre-production costs are those associated with bringing a project to the point of being produced (work before actual production shoot).

This includes:

- Acquisition of technical skills and training
 - Research of topic
 - Meetings and pre-interviews with consultants, experts or other key persons
 - Researching or obtaining archival footage, still photos, etc.
 - Research travel and/or location scouting
 - Administrative costs related to research (telephone, postage, copying, etc.)
 - Recruiting production crew or talent
 - Preparing a fundraising trailer and/or other fundraising material
 - Treatment, script or story board development other than for dramatic feature films
- (2) **Distribution:** support for especially innovative film and video distribution initiatives that can extend the use of social change media to organizing or educational venues. The Fund's primary interest in providing distribution support is to help increase and extend the use of social change media beyond the traditional distribution channels. While recognizing that these traditional outlets (i.e. public television broadcast, theatrical release, film and video festivals, and distribution to educational and institutional markets through non-profit and commercial distribution companies) are valid and important, we are looking for creative initiatives that use media as a resource for organizing and empowerment among broad-based constituencies and groups working toward progressive social change.

Previous Robeson Fund grantees may re-apply for funding for the same project ONLY under these conditions:

- Radio grantees may reapply each year for ongoing projects by demonstrating compelling reasons for additional funding of their production.
- Grantees must submit a completed fiscal and progress report form for the previous grant. This includes an audio or video tape of any finished work, funded by the grant, to be included as part of the Paul Robeson Fund Library.
- Film and video pre-production grantees may apply for a distribution grant for the previously funded project.

What We Do Not Fund

- Media projects other than film, video and radio production (i.e. publications, slide presentations, photography, etc.).
- Film, video and audio installations, festivals, conferences, exhibits or special events.
- Organizational projects for internal or promotional use.
- Purely personal works or "human interest" stories with little or no social change relevance or impact.
- Sociological and anthropological explorations which do not provide a strong progressive political analysis.
- Documentation that is primarily of cultural events, personalities or performances (dance, theater, music, visual arts, etc.) which does not provide progressive analysis or a social change focus.
- Public television or radio station productions (except collaborations where independent producers maintain editorial and financial control).
- General operating expenses of distribution companies, non-profit media organizations or an artist's office, studio, or home.
- Script development for dramatic features or radio dramas.
- Student productions or other projects associated with a degree program and academic credit, or projects that receive direct financial support from the educational institution.
- Productions originating in countries outside the U.S. unless the distribution strategy incorporates (in significant part) organizing in the United States.
- Public Service Announcements.

Step by Step Application Instructions - Paul Robeson Fund

I. Coversheet (See Pages 11 & 12)

At the top of the page, check the funding category for which you are applying and provide the project title, project director name(s), full address and phone/fax number(s). If you have access to the Internet, provide your e-mail and/or web site address.

Section A - Budget and Current Status

Current status of project - the current stage of development of the project.

Letter of commitment - check if you have attached a letter(s) of commitment between the producer and the organization(s) to collaborate on this project.

Budget information - In the space provided, fill in the amount you are requesting from the Paul Robeson Fund; the total amount of funds raised to date; the total of all in-kind (donated, not purchased, services, facilities or materials) contributions; and the total budget of the production/project (including in-kind), actual and projected. **The total project budget line requires the total sum of all pre-production, production, post-production, and distribution costs.** If you are an organization, please also fill in your total organizational budget.

Section B - Fiscal Sponsorship or Tax Exempt 501 (c)(3) Status

You do not need a fiscal sponsor in order to apply for funding. However, you will need to provide documentation to support your 501(c)(3) tax-exempt status of your organization or fiscal sponsor in order to receive any grant monies. If you currently are a 501 (c)(3) organization or have a fiscal sponsor, please provide the information in this section and check the box indicating you are enclosing your 501(c)(3) letter. If you do not have tax exempt status or a fiscal sponsor, leave this blank. If you should be awarded a grant, we will allow you time to obtain a sponsor.

Section C - (Radio only)

Indicate whether this is a pilot, special, limited series or on-going series.

Section C - (Film and Video only)

Identify the format and running time of the completed production.

Section D - Description of Proposed Project

In a clear and concise way and in the space provided, give a **one or two sentence** description of your project. This description is critical because it may be used for screening your application.

Section E - Sample Work Tape(s) Guidelines

Sample material is extremely important in our consideration of your proposal. Applicants should use the sample material as an opportunity to show the best work of the participating producer(s). Therefore, include sample material that is the strongest and most impressive in content, form and production quality, and that meets the criteria below.

If the producer(s) does not have a sample of a previously completed work or a trailer (this may include raw material or edited footage) from the proposed project, applicants must send a completed work by one of the key production personnel for the proposed project (cinematographer, editor, etc.).

Radio Sample Work

Submit one (1) audio cassette or compact disc of the producer's work, cued for at least 10 minutes of listening, that best represents the producer's talents and skills. If possible, submit a sample that is similar in content, genre and form to the proposed project.

Video Sample Work

Your video sample work must be submitted on ½" VHS tape(s) format. The tape must be cued for at least 10 minutes of viewing. For pre-production requests, the sample must either be a trailer for the proposed project or a previously completed work. If possible, previous work should be relevant to the proposed project in content, genre

and/or form. For distribution requests, you **must** submit the **completed** film or video (fine cut, answer or release print is OK) on VHS format. We cannot accept DVDs or other formats.

You may submit two tapes **if and only if** you are submitting a trailer that is less than 10 minutes. In this case, the applicant should submit the trailer of any length and a previously completed work of at least 10 minutes.

Label the sample tape(s) or CD with the title(s), running time and producer(s) name(s). Indicate in the Application, Section E, the title of sample work(s) you are submitting, the year it was made, its budget and the format used. Indicate the running time for the sample(s) and applicant's credit on the sample. If the sample is a completed work, summarize its activist distribution history or any organizing involved or that resulted. You may also mention major festivals, broadcasts or screening history as well. In describing the sample work, give a brief description of the project and what themes or issues are being addressed. Include a brief description of the 10 minutes that are cued for the Robeson Panel to review.

Section F - Agreement

Please read the agreement, sign and date the application.

II. Narrative

On separate sheets of paper please provide the following information. Be sure to label each section G-K and remain within the maximum word or space allowed for each section.

Section G - Project Summary (500 word maximum)

Describe your project and its social change goals. Address its themes, your approach to the subject, and why you chose this approach. Include why this issue is important to address; if other productions exist on your subject, explain why your treatment is different and why it is needed. Describe the visual and stylistic approach. Identify the people to be interviewed or used as experts for reference and background. Describe the nature and extent of the involvement of members of communities depicted in the production. Specify how this grant will be used.

Section H - Fundraising Strategy (250 words maximum)

List sources of current funding (in-hand and pending) and explain your strategy for future funding with specific sources and amounts received and/or requested. The thoroughness of this strategy helps us determine your capacity to complete your project or meet your distribution goals.

Section I - Distribution Initiatives (250 word maximum)

All applicants must complete this section whether you are applying for a pre-production or distribution grant. A well thought out distribution plan is vital to the success of your application. This section must demonstrate how your project/production will be used as a tool for progressive social change organizing. In completing this section, use the following guidelines to outline the distribution initiative:

- 1) Please be specific and concise in how this production will act as a tool for grassroots organizing. i.e. How is it part of an organizing campaign?
- 2) Specifically identify the audience(s) for which your project is intended; tell us how you plan to reach them and what you hope the audience(s) will do as a result of viewing or listening to your production. Tell us if you will provide educational materials such as study guides or tool kits to stimulate further dialogue or organizing.
- 3) Collaborations are strategic alliances between media makers (or producers) and organizations. If your project is a collaboration with a community-based organization, educational or health institution, or a network, identify it and explain why you've chosen this particular organization or network. Explain what advantage this collaboration provides. Describe your role as well as the organization's role in the collaboration. Briefly describe the organization's background and mission. Collaborations require a signed agreement between the producer and the organization, specifically stating who has editorial and distribution rights, to be submitted with the application.
- 4) Tell us if your project involves: a) an activity to be carried out by or materials to be used by a commercial or non-profit distribution company; b) television broadcast or theatrical release; or c) entry to film or video festivals. Explain why support from The Paul Robeson Fund is needed, since the Fund is primarily interested in funding innovative grassroots distribution strategies. Also explain why these traditional methods are suited to reach your intended audience and what follow-up strategies will contribute to the social change goals you seek. If a distributor

has agreed to distribute your film or video, please provide a letter from the distributor to this effect.

Section J - Key Production Personnel Sketch (250 word maximum)

Focus on the producer's experience and background, including experience with the issues being addressed and/or media activism. Summarize the experience and background of key production personnel. Include titles of past projects and list key awards. Also provide names and credentials of key consultants. **You must also provide a complete description of the key production and consultants' demographic composition. A description of each person's gender, race, sexual orientation, and economic status is essential.** Please also tell us what relationship the production team has to the issue or characters in the proposed project.

Section K - Budget (one 8 ½" x 11" page)

Provide a total budget for your project that includes pre-production, production, post-production and distribution. Itemize and include in-kind as well as actual expenses. A complete budget also includes a list of income sources. Please also indicate how Robeson grant monies will be used. Your totals should match the figures on the front of your application. Should your project budget and income change significantly after May 15, please send a one (1) page update no later than July 1.

When and who to contact

Because of the volume of applications, we are not able to respond to questions about the feasibility or status of projects. Please read these guidelines carefully. If your questions are still unanswered, please call the Robeson Fund program officer at the Funding Exchange and have the guidelines in hand for reference during your call. All applicants will be notified of grant decisions in October.

Promotional Activities

As a key resource to progressive radio, film and video makers and to media activism, the Paul Robeson Fund for Independent Media is a unique funding source, its significance far outstripping its size. That's why we'd like your assistance in helping us to promote the Robeson Fund.

If you receive a grant, you will be asked to:

- Cite "The Paul Robeson Fund for Independent Media/Funding Exchange" in the production credits, as well as in all promotional and publicity materials.
- Send us a copy of the completed work along with any promotional and educational materials.
- Include a copy of your finished work to be kept in the Paul Robeson Library.
- Notify us when there is a national broadcast or special screening.

The Funding Exchange retains the right to promote all funded video, film and radio projects as part of the Paul Robeson Fund collection. Promotional activities may include trailers, Best of Robeson Festivals, public access and other broadcasting, etc. The Robeson Fund may broadcast funded projects in whole or in part and will take every opportunity to promote the independent media makers as we showcase their work.

Application Form: coversheet and narrative information

Please review Step by Step Application Instructions in Robeson Guidelines. Completed applications must include coversheet, narrative and sample work as described in guidelines.

Date of Application: _____

I. Coversheet: Please type all information and use only the space provided on this sheet.

Check one: ☐ Radio ☐ Film/Video Pre-production ☐ Film/Video Distribution

Project Title _____

Project Director (s) (Last name, first) _____

Street/City/State/Zip _____

Telephone () _____ Fax () _____

Email _____ Website _____

SECTION A - Budget and Current Status

Current Status of Project _____ Funds Raised to Date \$ _____ (in kind)\$ _____

Amount Requested \$ _____ Total Project Budget \$ _____

If you are an organization, please provide the total organizational budget: \$ _____

SECTION B - Fiscal Sponsorship and 501 (c)(3) Tax Exempt Status
(Leave blank if you do not have a fiscal sponsor or 501 (c) (3) status.)

Organization _____

Street/City/State/Zip _____

Contact Person/Telephone _____

I have enclosed my 501 c 3 letter: ☐ Yes ☐ No

Section C- Radio (Complete this Section for Radio Only.)

Format: _____ Length of Proposed Production/Series: _____

Letter of Commitment Attached: ☐ Yes

Check one: ☐ Pilot ☐ Special ☐ Limited Series ☐ On-going series ☐ Total Amount of Programming

SECTION C - Film/Video (Complete this Section for Video/Film Only.)

Format: _____ Length of Proposed Production: _____

Check one: ☐ 16 mm Film ☐ 35 mm Film ☐ Video

SECTION D - Description of Proposed Project (use only space provided below.)

SECTION E - Sample Work

Title _____

Year Made: _____

Total budget \$ _____ Format: _____

Length of Entire Work: _____

Applicant's Credit on Sample: _____

Summarize Activism/Organizing Distribution History of Work Sample. Use only space provided below.

Description of Work Sample and Section to be viewed by the Robeson Panel. Use only space provided below.

SECTION F - Agreement

It is understood and agreed to by the applicant that the primary purpose of the proposed project is educational, artistic or charitable. Any funds granted will be used for the purposed stated in this proposal. The applicant will notify the Funding Exchange in writing of any substantial changes in this project, as stated in this proposal.

Project Director's Signature: _____ Date: _____

II. NARRATIVE: Please complete sections G-K on separate sheets of paper. Be sure to label each section and DO NOT exceed the maximum word count or space allowed for each section. Refer to the guidelines for specific instruction.

Section G - Project Summary (500 words maximum)

Section H - Fundraising Strategy (250 words maximum)

Section I - Distribution Initiatives (250 words maximum)

Section J - Key Production Personnel Sketch (250 words maximum)

Section K - Budget (no more than one 8 ½" x 11" page)

Mail complete 9 collated and stapled copies of coversheet and narrative with sample work to:

Paul Robeson Fund for Independent Media / Funding Exchange, 666 Broadway, Suite 500, New York, NY 10012

Final Checklist - Paul Robeson Fund

Provide all information (typed or neatly printed) in the spaces available on the Robeson Fund Coversheet. You may duplicate the coversheet, but it must be identical in all aspects to the original. The coversheet can be downloaded from our website: www.fex.org; look for the Paul Robeson Fund under the "grantmaking programs" link. Narrative sections G-K must be typed. Please do not alter the content or layout of the coversheet.

Please do not exceed the amount of words or space indicated and do not use a font size smaller than 12 point.

Don't Forget to:

1. Make nine (9) sets of the completed application, including:

- Coversheet and narrative
- 501(c)(3) tax letter from fiscal sponsor (if available at the time)
- Letter of commitment from organizations or distributors assisting in the distribution or production of your project - see Radio Criteria or Film and Video Criteria
- Be sure to staple each application set. No binders or folders, please.

2. Submit one (1) copy of sample tape(s) with application. Label the audio or video tape cassette. Sample tape(s) must accompany application by May 15 and may not be sent under separate cover.

3. Include one (1) copy ONLY of relevant material that is a part of your distribution strategy (possible examples: study guide, action/activists guide, flyer/poster, newsletters, etc.)

4. (Optional) Include a self addressed and stamped postcard. This will act as a receipt of your application and will be returned to you by June 15. Please do not call to confirm receipt of your application.

5. (Optional) Include a self addressed and stamped envelope for return of your sample work. If your proposal is awarded a grant by the Funding Exchange, we would like the option of keeping the sample work to use for educational or promotional purposes for the Paul Robeson Fund. If your proposal is not funded, we will return your sample work in the self-addressed stamped (appropriate for shipping) envelope. Any tapes that are not returned to you will be recycled.

Revisions

If there are significant changes in the nature or content or funding status of your project, you may send or fax information (1-2 pages maximum) by July 1. Please, however, keep us informed of any contact or address changes.

Please take note:

- Applications are only accepted between April 15 and the May 15 postmark deadline.
- All applications must be postmarked or hand-delivered by May 15, no later than 6:00 pm. No email or fax applications are accepted.
- You may not send additional material to complete or supplement your application after the deadline date.
- Please do not attach additional information not requested such as resumes, scripts, letters of intent or support, flyers, articles, etc.
- Applicants may not substitute pages to their application or exchange sample material once they are received by our office.
- Grantees who do not complete and return the Funding Exchange progress report may not be considered for future funding.

The Emergency Fund

Introduction

The Funding Exchange has an **Emergency Fund** with limited resources whereby, if you qualify, you may receive a grant of \$1,000 or less in support of a specific social change project, event or initiative. The Emergency Fund makes grants in response to political crisis or opportunities, when a small amount of money can make a difference in educating or mobilizing for social change; *instances when the organization could not have foreseen the need for the activity but are compelled by the moment.*

How to Apply

In order to be considered for an emergency grant, we must receive the following 3-part written request, *under a single cover*, by mail, email or fax, *clearly directed to the attention of the Emergency Fund*:

- A two-page description of the situation your organization is facing, why it constitutes an emergency, and what role the grant would play in making a difference. *Be sure to include your mailing address as well as phone, email and other pertinent contact information.*
- A relevant, *line-item* budget for the activities being planned and an indication of where any other funds needed may come from. *Be sure to include revenue as well as your expenses.*
- The total dollar amount of your organizational budget (line item breakdown not necessary).
- Clarification of your organization's or fiscal sponsor's tax-exempt status.

The Emergency Fund is open to all organizations including current and former grantees and new applicants. **However, an organization may only be funded by the Emergency Fund once within a given calendar year.**

When applying, please be certain to include your postal mailing address and specify a contact person and send your request to the following address, fax number or email:

Funding Exchange
ATTN: EMERGENCY FUND
666 Broadway, Suite 500
New York, NY 10012
Fax: 212-982-9272
Email: grants@fex.org

If you choose to email your emergency request, *you must still include all 3 components* and send only to the email address above.

NOTE: The Funding Exchange *does not* accept any other grant requests or proposals via email.

The Ignacio Martín-Baró Fund for Mental & Human Health Rights

Ignacio Martín-Baró was one of six Jesuits murdered in 1989 at the José Siméon Canas University of Central America in San Salvador. Through his advocacy, research, and community programs, he worked to heal the individual and collective scars of war and oppression. To honor his commitment and continue his work, the Ignacio Martín-Baró Fund for Mental Health and Human Rights was established at the Funding Exchange. The Martín-Baró Fund fosters psychological well-being, social consciousness and community-based action in response to violence, repression and social injustice.

The Fund supports groups or projects that meet the following criteria:

- work on mental health and human rights; and,
- are organized to support survivors of state-sponsored violence, including torture, war and displacement, and political, social, and economic oppression; and challenge the fundamental political and economic structures that sustain state sponsored or sanctioned violence.

The purpose of the Fund is not to support individual therapy. The large majority of grantees are outside of the United States.

Deadlines for new project proposals (not funded by MBF in the prior year) are as follows:

- One-to-two page letters of interest are accepted between **May 1 and September 1**
- MBF will invite selected organizations to submit full proposals by **December 31**
- Full proposals, if requested, are due by **March 15**

Projects currently being funded by MBF should keep in touch with their contact person, to find out how and when to submit materials for renewal or about their eligibility.

For more information about this fund and its funding guidelines, visit the website at www.martinbarofund.org or contact MBF via email at contact@martinbarofund.org.

Additional Resources

The Foundation Center is a valuable resource for grantseekers. It was established by foundations to provide resources for non-profits and an authoritative source of information on private philanthropic giving. Reference collections in New York, Washington, DC, Cleveland and San Francisco offer services and information on foundations and grants, as well as valuable information regarding non-profit Management. Useful material is also available at the Foundation Center's "Cooperating Collections," which are housed in public libraries, community foundations and other nonprofit institutions around the country.

The Foundation Center
79 Fifth Avenue
New York, NY 10003
Phone: (800) 424-9836 or (212) 620-4230
Website: www.fdncenter.org

The National Network of Grantmakers (NNG), made up of over 400 individual funders committed to social change, has developed a Common Grant Application which can be submitted, with additional information as requested, to a number of progressive funders, including the Funding Exchange. In addition, NNG offers a membership directory featuring social change grantmaking programs and additional resources. The directory has up-to-date-grantmaking information, user-friendly indexes by geographic area (including international funders), and over 30 issue areas and populations funded by grantmakers. It also has information about special groups of grantmakers, such as *Funders for Lesbian and Gay Issues* (see below) and *Native Americans in Philanthropy*.

National Network of Grantmakers
150 Court Street, 2nd Floor
Brooklyn, NY 11201
Phone: (718) 923-1400 x.242
Website: www.nng.org

Funders for Lesbian and Gay Issues is an association of grantmakers committed to increasing philanthropic resources for lesbian, gay, bisexual and transgender issues. They publish a directory of foundations and corporations who fund LGBT issues, which is available in paper copy or on their web site at www.lgbtfunders.org.

Funders for Lesbian and Gay Issues
Nancy Cunningham, Executive Director
116 East 16th Street, 7th Floor New York, NY 10003
Phone: (212) 475-2930
Fax: (212) 982-3321
Website: www.lgbtfunders.org

Funding Exchange Network Directory

Appalachian Community Fund

107 West Main Street
Knoxville, TN 37902
Phone: 865.523.5783
Fax: 865.523.1896
info@appalachiancommunityfund.org
www.appalachiancommunityfund.org

Bread & Roses Community Fund

1500 Walnut Street, Suite 1305
Philadelphia, PA 19102
Phone: 215.731.1107
Fax: 215.731.0453
info@breadrosesfund.org
www.breadrosesfund.org

Chinook Fund

2418 W. 32nd Avenue
Denver, CO 80211
Phone: 303.455.6905
Fax: 303.477.1617
office@chinookfund.org
www.chinookfund.org

Crossroads Fund

3411 West Diversey #20
Chicago, IL 60647
Phone: 773.227.7676
Fax: 773.227.7790
info@crossroadsfund.org
www.crossroadsfund.org

Fund for Santa Barbara

924 Anacapa St. - Suite 4H
Santa Barbara, CA 93101
Phone: 805.962.9164
TDD via CRS: 800.735.2929
Fax: 805.965.0217
email@fundforsantabarbara.org
www.fundforsantabarbara.org

Fund for Southern Communities

4285-G Memorial Drive
Decatur, Georgia 30032-1237
Phone: 404.292.7600
Fax: 404.292.7835
Email: FSC@fund4south.org
www.fund4south.org

Haymarket People's Fund

42 Seaverns Avenue
Jamaica Plain, MA 02130
Phone: 617.522.7676
Fax: 617.522.9580
Haymarket@igc.apc.org
www.haymarket.org

Headwaters Fund

122 W. Franklin Avenue, Suite #518
Minneapolis, MN 55404
Phone: 612.879.0602
Fax: 612.879.0613
Info@headwatersfund.org
www.headwatersfund.org

Liberty Hill Foundation

2121 Cloverfield Boulevard, Suite 113
Santa Monica, CA 90404
Phone: 310.453.3611
Fax: 310.453.7806
lparedes@libertyhill.org
www.libertyhill.org

McKenzie River

Gathering Foundation
2705 E. Burnside St. #210
Portland, OR 97214
Phone: 503.289.1517
Fax: 503.232.1731
info@mrgfoundation.org
www.mrgfoundation.org

North Star Fund

305 Seventh Avenue, 5th Fl
New York, NY 10001-6008
Phone: 212.620.9110
Fax: 212.620.8178
northstarny@earthlink.net
www.northstarfund.org

San Diego Foundation for Change

3758 30th Street
San Diego, CA 92104
Phone: 619.692.0527
Fax: 619.255.3640
info@foundation4change.org
www.foundation4change.org

The People's Fund - Hawai'i

1325 Nu'uanu Avenue #207
Honolulu, HI 96817
Phone: 808.526.2441
Fax: 808.526.2441
peoples@lava.net
www.fex.org

Three Rivers Community Fund

100 N. Braddock Avenue #207
Pittsburgh, PA 15208
Phone: 412.243.9250
Fax: 412.243.0504
TRCFP@aol.com
<http://trfn.clpgh.org/trcf>

Vanguard Public Foundation

383 Rhode Island Street, Suite 301
San Francisco, CA 94103
Phone: 415.487.2111
Fax: 415.487.2124
vpf@vanguardsf.org
www.vanguardsf.org

Wisconsin Community Fund

1202 Williamson Street, Suite D,
Madison, WI 53703
Phone: 608.251.6834
Fax: 608.251.6846
info@wisconsincommunityfund.org
www.wisconsincommunityfund.org

Funding Exchange

National Office
666 Broadway, Suite 500
New York, NY 10012
Phone: 212.529.5300
Fax: 212.982.9272
Email: fexexc@aol.com
www.fex.org

Funding Exchange

666 Broadway, Suite 500
New York, NY 10012
212-529-5300
www.fex.org



Grant Application Deadlines:

March 1: OSD Program

Out Fund for Gay &
Lesbian Liberation
Saguaro Fund
Grantmaking Docket

May 15: Paul Robeson Fund for Independent Media

All applications must either be **HAND-DELIVERED** by 6:00 p.m. EST or **POSTMARKED** by the appropriate deadlines. We will not accept late applications, emailed or faxed applications or late additions or components of applications after deadline.